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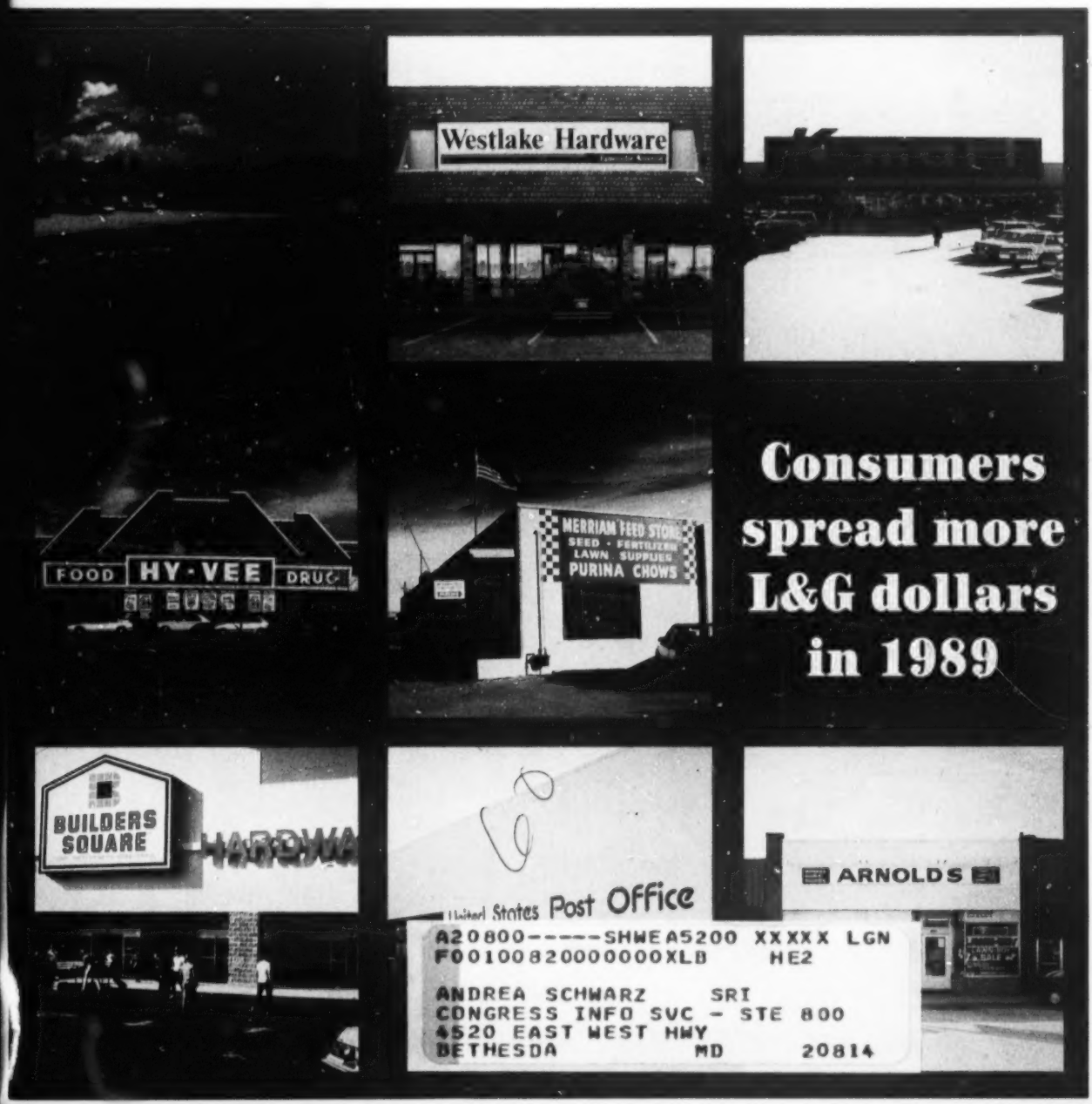
Lawn&Garden Marketing™

MARCH 1990

An Intertec publication

Cover story: National Gardening Survey results

Zero-turn technology • Pesticide/fertilizer promotions



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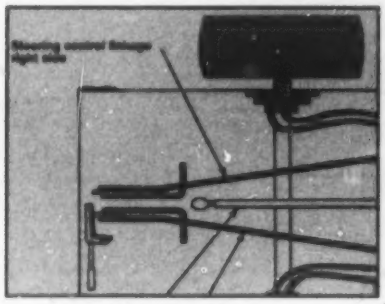
Lawn&Garden Marketing™

The merchandising magazine for lawn, garden and leisure living products.

Sales rebound, store traffic up, 6



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Did you know?

At garden centers/nurseries, annuals average the highest number of turns at 16. Shrubs typically turn 6 times. Hardgoods and houseplants are tied at 4. Trees are lowest at 1.5.

Source: Nursery Business Consultants

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From the Editor

The lawn and garden industry can learn a lot from the supermarket industry. Although there are many dissimilarities in our businesses, supermarkets are the training grounds for consumers. Because consumers are in grocery stores practically 52 weeks of the year, what they become accustomed to in those environments eventually affects other retail environments, including lawn and garden.

Unlike lawn and garden retailers, supermarkets have low margins but tremendously high inventory turns. With an average gross margin of 21.2 percent, independent grocery operators must make other compensations to customers in order to achieve higher than average inventory turns.

One of the ways supermarkets encourage such high turns is by getting the customer through all parts of the store. They do that through a method called "race-tracking"—putting high-demand products like produce, meat and dairy products along the outside walls. Since these are grocery staples, the customer must travel throughout the store. The motive here is that along the way other items attract the customer down the aisles.

Grocery retailers are so good at this, in fact, traffic flow reaches well above 50 percent in nearly all aisles of the store, a pattern not often realized—even in peak season—by lawn and garden retailers. Attractive pricing in endcap displays are critical to this effort. Because of their reliance on high turns, grocery retailers can't afford to have any dead spots in aisles or on shelves.

Lawn and garden retailers can take a lesson from this by carefully evaluating customer traffic through your own store. By putting high-demand products away from the entrance, freeing up dead aisles, and providing clear and concise signage, you can increase customer flow throughout the store or greenhouse.

Supermarket retailers attract customers with service as well: salad bars; bakeries; price breakdowns by cost per ounce; cash registers for eight items or less; product content analysis with breakdowns of sodium, fat, carbohydrates and calories; scanned checkouts; extended store hours; and carryout.

Consistent, frequent advertising, well-designed easy-to-read signage, and added value help grocery retailers attract and retain customers. Lawn and garden retailers can ride this trend by giving customers the level of service they've come to expect from the retailing industry.

Lawn and garden services can include such mainstays as delivery and installation or demonstrations of product use. But, they also can include such added things as posting average calories burned by lawn and garden activity, average increase in home value by landscaping project or average time saved by use of a certain product.

These are just a few ideas that you can borrow from the supermarket industry and adapt to your own operation. I think there are many other ideas worth considering. After all, your customers are your bread and butter.

Susan L. Anderson

Lawn&Garden Marketing

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Sales rebound, store traffic up in '89

Total lawn and garden sales were up 5 percent in 1989. Store traffic for lawn and garden retailers showed strong growth as competition for sales increased.

By Bruce Butterfield, *National Gardening Assn.*

Lawn and garden retail sales totaled an estimated $16.3 billion in 1989 compared with $15.5 billion in 1988 and $17.5 billion in 1987, according to the *1989-90 National Gardening Survey* conducted for the National Gardening Assn. by the Gallup Organization.

U.S. households spent an average of $245 each on their lawns and gardens in 1989 compared with $227 in 1988 and $251 in 1987. The negative impact of the widespread drought and unusually hot summer weather on lawn and garden sales in 1988 was not a factor in 1989 as consumer interest, participation and spending returned to more normal levels.

While total sales in 1989 were slightly below the record set in 1987 for the decade, the fact that sales for eight out of 10 categories of lawn and garden spending rebounded in 1989 from 1988 was a clear indication of the buoyancy in consumer spending for lawn and garden products in the United States. This is a very encouraging sign as we begin the 1990s.

Overall, 75 percent of the 92.8 million households in America, or an estimated 70 million households, participated in one or more types of indoor and outdoor lawn and garden activities in 1989. This compares with 76 percent (69 million households) in 1988 and 78 percent (70 million households) in 1987.

From 1988 to 1989, the total U.S. household population increased by 1.7 million households. These and other results of the *1989-90 National Gardening Survey* are based on the findings of 2,000 at-home personal interviews with a representative sample of U.S. households in all 50 states. Interviews were conducted during November and December 1989. This sample has a margin of error of plus or minus three percentage points.

L&G retail outlets

*Read as "Percent of L&G participants who said they purchased from (establishment)."**

	1987		1988		1989		1988 - 89 Change	
	%	$ Mil.	%	$ Mil.	%	$ Mil.		
Garden center/ retail nursery	44	31	50	35	52	36	+2%	+1 Mil.
Hardware store	30	21	28	19	36	25	+8	+6
Mass Merchandiser/ discounter	21	15	27	19	34	23	+7	+4
Feed/seed store	19	13	18	12	22	16	+4	+4
Supermarket/drug store	15	11	19	13	24	17	+5	+4
Home center	16	11	17	12	22	15	+5	+3
Mail- order	8	6	9	6	12	8	+3	+2
Other	3	2	2	1	7	5	+6	+4

*Totals do not add up to 100% due to multiple responses.

Source: National Gardening Assn./Gallup Organization

Retailers vie for consumers

Competition for sales and market share among the many different types of businesses where lawn and garden products were sold in 1989 continued to increase. Last year, the number of customers who purchased lawn and garden products increased by only 1 percent. Per capita spending was up 8 percent. Overall retail sales increased by 5 percent, while the total number of different outlets where consumers bought lawn and garden products increased by 24 percent.

This means that in 1989 about the same number of consumers spent slightly more money, but they spent it at a greater number of outlets than they have in the past. Today's lawn and garden consumers are cross-shopping more, comparing quality, selection, price, value and making purchases from a wider range and number of different retail suppliers.

Garden centers/retail nurseries continued to lead all other types of outlets in terms of total number of customers in 1989 (36 million), followed by hardware stores (25 million), mass merchandisers/ discount stores (23 million), supermarket/ drug stores (17 million), feed/seed stores (16 million), home centers (15 million) and mail-order companies (8 million).

Each type of lawn and garden retailer

The total number of different outlets where consumers bought L&G products increased by 24 percent in 1989.

saw an increase in the number of customers who purchased products from their businesses in 1989. However, some businesses saw much bigger increases than others. From 1988 to 1989, the number of consumers who purchased lawn and garden products at hardware stores increased by 6 million, mass merchandisers 4 million, feed/seed stores 4 million, supermarket/drug stores 4 million, home centers 3 million, mail-order companies 2 million and garden center/retail nurseries 1 million.

A challenge for lawn and garden retailers in the 1990s will be to maintain and build customer loyalty so that people who spend money in your store today will come back next week instead of shopping at your competitors.

Sales, participation increase overall

Of the 15 individual categories of DIY lawn and garden activities measured from 1987 through 1989, only three categories—indoor houseplants, fruit trees and raising transplants—have shown a statistically significant decline in participation. Participation rates for lawn care, flower gardening, vegetable gardening, shrub care, insect control, flower bulbs, tree care, landscaping, container gardening, growing berries, ornamental gardening and herb gardening all have stayed at the same level.

The continued increase in the total number of U.S. households has been a more important factor in determining the growth in the number of households involved in lawn and garden activities during this time period than has an increase in participation rates.

Highlights of the trends during 1989 for each lawn and garden activity are:

- **Lawn care:** 53 million households (57 percent) participated in DIY lawn care in 1989, the same number as in 1988 and 1987. Retail sales for lawn care products and equipment increased 6 percent from 1988 to 1989 from $5.3 billion to $5.7 billion. Lawn care sales in 1989 reached a record high for the 1980s.
- **Landscaping:** 22 percent of households (20 million) did landscaping in 1989, about the same number as in 1988 and 1987. Consumers spent an average of $167 for landscaping in 1989 com

continued...

1989-89 NGA survey...continued

pared with $155 in 1988 and $183 in 1987. Retail sales for landscaping were $2.6 billion in 1989, up 11 percent from the $2.4 billion spent in 1988, but somewhat less than the $2.9 billion in retail sales for landscaping seen in 1987.

- **Flower gardening:** An estimated 38 million households had flower gardens in 1989 and 1988 compared to 39 million households in 1987. Retail sales for flower gardening supplies, such as annual and perennial plants, seeds, fertilizer and related products, totaled nearly $1.9 billion in 1989 compared with $1.7 billion in 1988 and $1.8 billion in 1987. Households with flower gardens spent an average of $52 in 1989 compared with $47 in 1988 and $49 in 1987.
- **Vegetable gardening:** 30 million households grew vegetable gardens in 1989 compared with 31 million households in 1988 and 29 million households in 1987. U.S. households with vegetable gardens spent an average of $36 in 1989, $33 in 1988 and $45 in 1987. Total retail sales for vegetable gardening in 1989 were just more than $1 billion compared with $982 million in 1988 and $1.3 billion in 1987.
- **Insect control:** Retail sales for insect control products set a record during 1989. In total, consumers spent an estimated $1.1 billion last year compared with $880 million in 1988 and $979 million in 1987. U.S. households spent an average of $41 on insect control last year compared with $33 in 1988 and $39 in 1987. There were 27 million households that participated in insect control in 1989 compared with 29 million in 1988 and 27 million in 1987.
- **Indoor houseplants:** An estimated 34 million households (37 percent) grew indoor houseplants in 1989 compared with 37 million (41 percent) in 1988 and 37 million (41 percent) in 1987. Total retail sales for houseplants and supplies in 1989 were an estimated $822 million compared with $819 million in 1988 and $1.1 billion in 1987. Average household spending on houseplants and supplies in 1989 was $31 compared with $27 in 1988 and $36 in 1987.
- **Tree care:** Retail sales for tree care in 1989 were $886 million, which was well below tree care sales of $1.1 billion in 1988 and $1.3 billion in 1987. In 1989, 23 percent of households responding to the Survey, or an estimated 21 million households, indicated they did tree care during the past year, which was about the same percentage and number of households as seen in 1988 (21 million) and in 1987 (22 million). The average amount of money spent on tree care last year ($67) was significantly less than that spent in 1988 ($81) and in 1987 ($89), which is the main reason for the decline in sales in this category.
- **Shrub care:** Retail sales for shrub care in 1989 totaled $844 million compared with $853 million in 1988 and $840 million in 1987. On the average, households that did shrub care last year spent $53 compared with $43 in 1988 and $46 in 1987. The fact that average household spending on shrub care increased by 23 percent from 1988 to 1989 was able to offset a 12 percent decline in the number of households doing shrub care during this same time period. In 1989 there were an estimated 27 million households involved in shrub care compared with 31 million households in 1988 and 29 million households in 1987.
- **Flower bulbs:** Consumer spending on flower bulbs from 1988 to 1989 increased by 19 percent from an estimated $396 million in 1988 to $470 million in 1989. Sales of flower bulbs in 1989 also were higher than in 1987 when they

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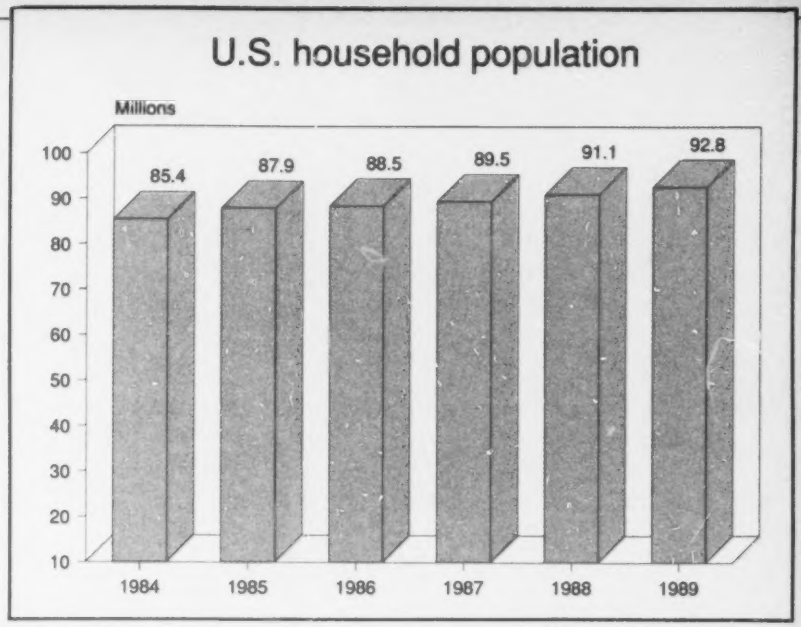

U.S. L&G households

Read as "Percent/number of households participating in L&G activity."

Activity	1987 %	1987 Mil.	1988 %	1988 Mil.	1989 %	1989 Mil.
Lawn care	59	53	58	53	57	53
Flower gardening	43	39	42	38	41	38
Indoor houseplants	41	37	41	37	37	34
Vegetable gardening	33	29	34	31	32	30
Shrub care	33	29	34	31	29	27
Insect control	30	27	32	29	29	27
Flower bulbs	27	24	24	22	23	21
Tree care	25	22	23	21	23	21
Landscaping	24	21	22	20	22	20
Fruit trees	18	16	16	15	14	13
Raising transplants	15	13	11	10	11	10
Growing berries	9	8	8	7	7	6
Ornamental gardening	8	7	6	6	5	5
Container gardening	12	11	11	10	11	10
Herb gardening	7	6	5	5	7	6
TOTAL*	78	70	76	69	75	70

*Total is the % of U.S. households that participated in at least one type of indoor/outdoor L&G activity each year. Totals do not add up to 100% due to multiple responses.

Source: National Gardening Assn./Gallup Organization

1988-89 NGA survey...continued

totaled $456 million. U.S. households spent an average of $28 on spring and summer flowering bulbs in 1989 compared with $24 in 1988 and $25 in 1987. In 1989 there were an estimated 21 million households that grew flower bulbs compared with 22 million in 1988 and 24 million households in 1987.

- **Fruit trees:** In 1989, an estimated 13 million households planted or maintained fruit trees on their properties. That compares with 15 million households in 1988 and 16 million households in 1987. Retail sales for planting and maintaining fruit trees totaled $287 million in 1989, $416 million in 1988 and $292 million in 1987. Households growing fruit trees spent an average of $33 in 1989, $42 in 1988 and $29 in 1987.
- **Ornamental gardening:** 5 million U.S. households participated in ornamental gardening in 1989 compared with 6 million households in 1988 and 7 million households in 1987. Ornamental gardening households spent an average of $70 on the activity in 1989 compared with $43 in 1988 and $91 in 1987. Total retail sales for ornamental gardening in 1989 were an estimated $266 million compared with $191 million in 1988 and $471 million in 1987.
- **Container gardening:** 10 million U.S. households gardened in containers in 1989, the same number as seen in 1988. In 1987, there were an estimated 11 million households involved in this activity. Retail sales for container gardening in 1989 totaled $240 million, $235 million in 1988 and $305 million in 1987. Container gardening households spent an average of $30 in 1989, $29 in 1988 and $33 in 1987.
- **Raising transplants:** 10 million households raised their own transplants from seeds or cuttings in 1989 and 1988. In 1987, an estimated 13 million households participated in this activity. Retail sales for supplies to raise transplants in 1989 totaled $139 million, $122 million in 1988 and $249 million in 1987. Households that raised their own transplants spent an average of $22 in 1989, $20 in 1988 and $30 in 1987.
- **Growing berries:** 6 million households grew berries in 1989, 7 million in 1988 and 8 million in 1987. Retail sales for growing berries in 1989 totaled $73 million, $57 million in 1988 and $95 million in 1987. Households that grew berries spent an average of $27 in 1989, $19 in 1988 and $22 in 1987.
- **Herb gardening:** 6 million households grew herbs in 1989, 5 million in 1988 and 6 million in 1987. Retail sales for herb gardening in 1989 totaled $58 million, $50 million in 1988 and $46 million in 1987. Herb gardening households spent an average of $13 on the activity in 1989, $14 in 1988 and $10 in 1987. **—LGM**

Household spending

Read as "Average dollar spent per household by L&G activity."

Activity	1987	1988	1989	1988 - 89 $ Change
Total	$251	$227	$245	+$18
Lawn care	$113	$112	$120	+$ 8
Landscaping	183	155	167	+ 12
Flower gardening	49	47	52	+ 5
Vegetable gardening	45	33	36	+ 3
Tree care	89	81	67	- 14
Indoor houseplants	36	27	31	+ 4
Shrub care	46	43	53	+ 10
Insect control	39	33	41	+ 8
Flower bulbs	25	24	28	+ 4
Fruit trees	29	42	33	- 9
Raising transplants	30	20	22	+ 2
Ornamental gardening	91	43	70	+ 27
Growing berries	22	19	27	+ 8
Container gardening	33	29	30	+ 1
Herb gardening	10	14	13	- 1

Columns do not add up due to multiple responses.

Source: National Gardening Assn./Gallup Organization

Retail sales

Read as "Amount of retail sales per L&G activity."

Activity	1987 $ Mil.	1988 $ Mil.	1989 $ Mil.	1988 - 89 % Change
Lawn care	$ 5,449	$ 5,342	$ 5,660	+ 6
Landscaping	2,921	2,356	2,605	+11
Flower gardening	1,777	1,679	1,857	+11
Vegetable gardening	1,253	982	1,026	+ 4
Tree care	1,253	1,140	886	- 22
Indoor houseplants	1,105	819	822	+ 0.3
Shrub care	840	853	844	- 1
Insect control	979	880	1,052	+20
Flower bulbs	456	396	470	+19
Fruit trees	292	416	287	- 31
Raising transplants	249	122	139	+14
Ornamental gardening	471	191	266	+39
Growing berries	95	57	73	+28
Container gardening	305	235	240	+ 2
Herb gardening	46	50	58	+16
TOTAL	$17,491	$15,518	$16,285	+ 5

Source: National Gardening Assn./Gallup Organization

Bruce Butterfield is the director of research for the National Gardening Assn. Each year, NGA publishes the *National Gardening Survey* based on research conducted by the Gallup Organization. The survey looks at U.S. household participation in lawn and garden activities, how much consumers spend, products purchased and other related subjects of interest. Complete survey results are published in a comprehensive 350- page report each year.

NGA is a member- supported, non- profit organization with headquarters in Burlington, Vt. Its 200,000 members receive the organization's monthly magazine, *National Gardening*, which, in addition to providing gardening information, permits members to exchange ideas and inquiries through its pages. The organization also offers members a Gardening Answer Service and Members Seed Testing Research, managed by staff horticulturists.

In addition, NGA is publisher of *Ruth Page's Gardening Journal*, a collection of programs from NGA's public radio program program, which is broadcast nationwide, and the 12- volume "Yardening" series of videocassettes. NGA is developing "Grow Lab" elementary science education programs using gardening as a hands- on learning tool.

For more information, contact NGA at 180 Flynn Ave., Burlington, VT 05401, (802) 863- 1308.

Garden centers made great strides in retail arena

According to a report from the Pennsylvania State University Cooperative Extension Service and the U.S. Department of Agriculture, sales from U.S garden centers jumped 88 percent from 1982 to 1987. The increase for all U.S. retail trade was only 44 percent.

There were 28 percent more lawn and garden supply stores in 1987 than there were in 1982. This includes businesses that added another location as well as new start-ups. The average dollar size per establishment in 1987 grew to $506,058 from $344,818 in 1982.

Sales per employee were up from $61,428 to $75,813, with the average payroll per employee increasing from $9,744 to $11,518. For every employee payroll dollar, $6.30 in sales were generated in 1982; compared to $6.58 in 1987.

Even more significant is the rise in sales per capita. In 1982, the average American spent $12.39 on lawn and garden supplies. In 1987, that figure jumped to $22.35, which is twice the increase from 1977 to 1982.

Some of these figures are taken from the official Census of Retail Trade done every five years by the U.S. Commerce Department.

Let's talk trees in elementary schools

An educational program sponsored by the American Assn. of Nurserymen, American Forestry Assn. and *Weekly Reader*, a classroom periodical, is targeting kindergarten through sixth grade students.

Teachers received a curriculum kit in January that describes global warming and the environmental benefits of planting trees. The materials suggest that teachers call on retailers to provide plant material because hands-on experience increases student interest and retention.

Teachers are being encouraged to use the lessons in April to tie in with National Gardening Month, Arbor Day and/or Earth Day. Garden centers not contacted by a teacher but wanting to participate in this program should contact Irv Siegelman at (203) 638-2400.

Point-of-sale materials increase sales

According to research by the International FlowerBulb Center of Hillegom, Holland, effective use of point-of-sale materials can boost sales of flower bulbs by as much as 30 percent. Flower bulb sales were stimulated by hanging colorful posters showing bulbs in full bloom.

Through the use of graphics and photography, easy-to-understand planting tips are communicated to the consumer. Once consumers have instructions and a four-color example of how beautiful their landscapes could be, there is an increase in the impulse to buy.

A free, full-color catalog of point-of-sale displays can be ordered from the Netherlands FlowerBulb Information Center, 162 Montague St., Brooklyn Heights, NY 11201; (718) 596-5400, fax (718) 596-4917.

Garden center profile

A recent report reveals how garden centers have grown over 20 years.

	1967	1977	1987
Sales (x1000)	$399,118	$1,590,199	$5,410,774
Establishments	3,031	6,921	10,692
Average GC size	$131,679	$229,764	$506,058
Sales per employee	$28,909	$43,735	$75,813
Payroll per employee	$4,392	$7,307	$11,518
Sales per capita	$2.02	$7.24	$22.35

Sources: U.S. Dept. of Agriculture; Penn State University Cooperative Extension Service; Dept. of Commerce, Census of Retail Trade

Peat producers sponsor promotions

The Canadian Sphagnum Peat Moss Assn. has produced a five-minute video that covers its 1990 promotional campaign. Aimed at retailers and distributors, the video describes the CSPMA program to boost sales of Canadian peat via media coverage, special events and the use of specially created merchandising items.

A four-color, six-page brochure that tells where the CSPMA intends to advertise and how retailers most effectively can tie in with this push will be mailed to 40,000 retailers. The brochure contains an order form for banners, caps and other merchandising aids.

The spokesperson for the association and narrator of the video, David Schaefer, is host of "The Joy of Gardening" which is syndicated on The Nashville Network. A cameo appearance by Jeff Ball, of "Yardening with Jeff Ball," adds to the credibility of the campaign.

The video is available from the CSPMA News Bureau at (800) 776-PEAT.

Briefs

- Pesticides again are a top priority by the Environmental Protection Agency it said in a report that compared risks and set priorities. Pesticides, especially those residual on food, are seen as a high health risk.

- Fisons Western Ltd. has changed its name to **Fisons Horticulture Inc.** Vancouver, Canada. The change comes to clarify the fact that the company serves North America.

- Gregg Wilkinson has been promoted to group sales manager of **Reemay Inc.,** Old Hickory, Tenn. John Russell was promoted to sales manager for construction fabrics and agricultural products. John Matheny is sales manager of home furnishings and apparel products. Gil Rains has been promoted to market development group manager. Ron Smorada now heads the international business division as director.

- Bert Sampson has been promoted to director of sales for **Greenview Lawncare Products,** Lebanon, Pa. Jack Weber will be sales supervisor for the North Central Division